Freemed-YiRC: ConDB Staff Dates Integration With The Calendar/Remindar System Walkthrough

– Joe Thielen – 1/09/2009

BEFORE YOU BEGIN

- The *User Calendar 2* and *Group Calendar 2* modules for Freemed-YiRC must be enabled. This should be done already, but in case it gets disabled, it can be re-enabled by:
  - Logging in as the *root* user.
  - Choosing *Settings* from the bottom of *root*'s main menu.
  - Choosing *Edit Module Settings*
  - Find *User Calendar 2 and Group Calendar 2* and set them to *Enabled*
  - Click *Update* at the bottom of the page
- There is a module setting for the Contact Database module for Freemed-YiRC which must be enabled in order to make use of the new functionality. Again, this should already be done, but if certain things are being displayed properly, make sure this is enabled:
  - Logging in as the *root* user.
  - Choosing *Settings* from the bottom of *root*'s main menu.
  - Choosing *Edit Module Settings*
  - Find *Contact Database* and click *Edit Module Settings* to the right of it.
  - Find the setting named *staff_dates_calendar_integration* and make sure the drop-down to the right of it is set at *Enabled*.
  - Click *Update* at the bottom of the page
- In order to access the *Staff Dates* functionality, you will require the following *Security Permissions*. These permissions can be given by using the *User Administration* link on the main menu (providing you have access to that).
  - *Contact Database Module*
    - *Access Staff*
    - *Edit*
    - *HR Priv*
    - *View*
  - *Group Calendar 2*
    - *Access*
    - *Edit* (optional)
  - *User Calendar 2*
    - *Access*

Introduction

Since many agencies have different type of dates they need to keep track of for staff, for HR purposes, Freemed-YiRC not only has a place to store these, but offers dynamic functionality which enables you to define as many of these types of date fields as you wish.

In addition, this functionality is now linked to the newer *User Calendar 2* and *Group Calendar 2* modules, which enable the automated creation of calendar events as well as the possibility of e-mail alerts based off these events for early notification purposes.

Accessing the Staff Dates

These Staff Dates are stored in the Contact Database, in the Staff section. To access this, chose *Contact Database* from the main menu (if you have the proper permissions). Then, choose any *Active* staff and click *View Contact*. For the purpose of this discussion we'll use the staff named *John Doe*.

You should now be looking at the *Staff info for John Doe* page. Here you should see *Demographics*, as well as *Addresses, Phone #s,* and *E-Mails*. Below that is the *Dates* section. There may or may not already be information here.

Creating Date Fields

Click the *Update* link in the *Dates* section.

If you have already defined any date fields, they will show up here. And because you have the *HR_Priv Security Permission* you should also see the *Edit*, *Delete,* and *Hide* links next to these fields. Let's start off by clicking on the *Add New Field* link.

NOTE! Adding/Editing fields will do so for the entire system, i.e., all staff, not just the person you have chosen (i.e., *John Doe*). Near the top of the next screen should it should display something to this effect.

The first three fields here deal specifically with the date field, and have nothing to do with calendar/reminder integration.

DB Field Name: This is the name of the database field. This field name should NOT contain any spaces or special characters with the exception of the underscore character (_). The example given is *first_aid*. Type this in as it's displayed above (without the single quotes).

Field Title: This is the name of the field as it will appear on the screen (i.e., for human beings). This may say whatever you wish it to say. Again, the example given is *First Aid*.

Field Descr: This is an additional field which indicates whether or not this date is used to describe a date on which something *Expires*, or if it indicates this is the date a test was *Taken on*, etc... This can be nearly anything you wish as well. For our purposes, please use *Expires*.

The rest of the fields on this page are in the *Calendar/Reminder Integration* section. If you do not see this section, please refer back to the *BEFORE YOU BEGIN* section of this document, and ensure that the module setting for the *Contact Database* module is correctly set to *Enabled*.

Automatically Create Calendar Events For This Field? This is a checkbox, and is used to indicate if you wish calendar events to be automatically created by the system. Again, please note, this is a system-wide setting. You are not just checking this for *John Doe*. There may be date fields for which you do not want calendar events and/or e-mail alerts to be sent out for. For our purposes, check the checkbox.

Calendar to create events on: Here, you must select from the *Group Calendars* in the system. This calendar will be where events for this field will be located. This functionality does not allow for events to be placed on your personal *User Calendar*. If your agency only has one person doing the HR work, you will either need to use the *Office Main Calendar* and create a sub-calendar for HR purposes, or create a separate *HR* group and simply have yourself as a member of this group.

Calendar Category: Please choose from the list of categories for which new events will be associated with. The primary purpose of this is to have these events be of a certain color on calendars, as to make them more distinguishable.

The following fields are used if you wish to have e-mail alerts sent out based on these calendar events.

E-Mail Alert: If you do wish to receive e-mail alerts, check the checkbox to the left of this.

The next two fields indicate how far in advance of a given date you wish to have e-mail alerts sent out. By default this is set to 1 day. If you want a month or more, simply choose 4 weeks, or 52 weeks for a year, etc...

IMPORTANT NOTE! For date fields other than *Expires On*, you may need to play some games here. For example, *First Aid* certificates may expire on a certain date. But other types of things, say a license, may only give the date on which it was earned, but is good for a certain number of years. If you choose to record the earned date instead of the expiration date, then you may need to enter a **NEGATIVE** number here. For example, if you enter a date that is last year, and it expires in one year, you may want to know one month ahead of time before that happens. Because that date is *in the past*, you need to enter a **NEGATIVE** number here, as e-mail alerts are usually sent out **BEFORE** an event takes place (i.e., an *expiration date*). So, given our example, you could put in 48 weeks, which would be 4 weeks short of 52 weeks (i.e., one year).

For our example, set it to 0 *Days* (i.e., the e-mail alert should go out on the actual event date/time).

The next box lists all of the users in the system who have e-mail accounts, as well as any aliases and groups (if you have the *Show Groups* security permission in the *E-Mail* section of the *Security Database*). Unless *John Doe* is an HR person, you would NOT choose this person! Remember, anything you do on this particular page is system-wide. This page is NOT specific to *John Doe*. This box is where you'd select your HR person or persons, or anyone who needs to know about this date for *ANY* staff. You may select as many people as you wish in this box.

For our example, choose yourself from the list of people.

Also E-Mail Alert The Individual Staff: You would click this checkbox if you wanted *John Doe* to receive an e-mail about his own date information. This option isn't specific to *John Doe*, if you check this box, then all users will get an e-mail about their own dates.

Check this box.

Finally, click the *Next* button at the bottom of the page.

Now you should see your new date field, *First Aid* on this list (as well as any other date fields you may have previously defined).

Now that we are out of *Edit* mode, this page is specifically oriented for *John Doe*.

Put in tomorrows date into the *First Aid* field, then click the *Update* button.

Now, in the *Dates* section you should see *First Aid*, and tomorrows date. If not, click *Update* in the *Dates* section and change it again.

When you clicked the *Update* button after putting in tomorrows date, that automatically created two calendar events. One on the *Group Calendar* that you chose for that field, and one on the personal *User Calendar* of *John Doe*.

Go back to the main menu, and click on the group of the group calendar you had previously selected, i.e., *Office* or *HR*. If you do not remember which group calendar you had selected, click the *Update* link in the *Dates* section of the *Contact Database*. Then click the *Edit* link next to the *First Aid* field. Look in the *Calendar/Reminder Integration* section in the *Calendar to create events on* field. This is the calendar you had chosen. The group abbreviation is listed in parenthesis before the calendar name.

Choose this group from the main menu. Then go to *Group Calendar 2*. If you chose a sub-calendar and not the *Main Calendar*, you will need to select that calendar from the drop-down at the top of the page and click on the *Switch* button.

Now, on tomorrows date, you should see an event. The event will be listed at midnight (*12:00AM*), and should read: *STAFF DATE: John Doe – First Aid*.

In addition, this event should also show up on *John Doe*'s *User Calendar* because we had chosen that last checkbox on the field editing screen which indicated that the individual involved should also get calendar events/e-mails.

So, since we set up e-mail alerts to go out zero days ahead of the event, you should also get an e-mail in the *FMYiRC* system tonight at midnight... i.e., zero days before the event.

In addition, *John Doe* will get an e-mail too.

These are the basic concepts to setting up the calendar integration with the *Staff Dates* section of the *Contact Database*.

Other Things You Should Know

When you edit a date in the *Staff Dates*, the calendar events will update automatically. If you set a date to blank, then the calendar events will get deleted.

Along this same line, if you or the user deletes these calendar events, and you re-edit the date in *Staff Dates*, the calendar events will get re-created.

At medium or larger sized agencies, there may be more than one person responsible for HR or licensing purposes. If this is the case, it may make more sense to create an *e-mail alias* for HR. The reason being is this... if you set up all the date fields to just e-mail yourself, and you either leave the company, or get an assistant, etc... then you will have to not only re-edit the date field, but ALL of the *existing* calendar events will NOT change automatically. You will physically need to manually go into the *Staff Dates* section of the *Contact Database* **FOR EACH AND EVERY STAFF** and click the *Update* button in order to adjust it! Whereas, if you set up an HR e-mail alias from the start, you will never have to worry about this, as when an e-mail alert is triggered, it will go out to the current list of people associated with the *HR* alias!

The same is true if you have already created date fields in the system, then enter dates for individual staff, but later decide to add calendar/e-mail integration. **The system *only* creates/edit calendar events when you click the *Update* button for a given staff in the *Staff Dates* section of the *Contact Database*!**